bpa bestlife℠
Benefit Plan Administrators, Inc.

www.bpatpa.com

Check List for Broker to Receive Quote

In order to serve you promptly and give complete quotes as quickly as possible, we've created a check list of information we need to accurately quote any potential clients. If we receive all of this information, we can provide a quote within 7 business days.

NOTE: We can only quote a minimum of 20 lives.

We provide a quote within 7 business days.

1. Complete Census, which must include: **(The reinsurers will not quote without a COMPLETE census.)**
   a. Name
   b. Gender
   c. Date of Birth
   d. **Plan (If there is more than one, indicate which plan the employee is currently enrolled.)**
   e. **Current Coverage Election** (e.g. EE, ES, EC, and Family) Please note our quotes assume 3 or more people = Family coverage We can get an exception, after the fact, for one parent and multiple children to be rated under employee child. We do this for consistency in the quoting process.
   f. Zip Code
   g. Note whether or not anyone is on COBRA or eligible for COBRA.
2. Current Benefit Plans Offered: **SBC is preferred for each plan...**
   1. Because it is dated
   2. It would have any company-negotiated changes.
3. Industry Type of Client
4. Address of Client (Corporate office is fine.). However, please note the number of locations and if they are multi-state, designating which states are included.
5. Main Phone Number (We will never contact the client directly without your knowledge or permission.)
6. **Current Rates for Each plan**
7. Renewal Rates (We understand that you may not have this piece of information, however it is extremely helpful in getting you the most competitive quote available.)

To get a quote completely underwritten, we will need either:

1. Completed Individual Health Applications
2. OR Current Claims Data

Please email all requests for proposals and completed information to:

rfps@bpatpa.com

Our contact info is as follows if you have any questions:

Morris Masinter,
President
morris@bpatpa.com

Tom Cardwell,
COO
tcardwell@bpatpa.com

Danielle Parker,
Stop Loss Manager
dparker@bpatpa.com

Thank you for your assistance. We look forward to helping you with your clients and prospects by providing you with accurate and prompt client service. If you have any questions about this process please call or email us.